

Exhibit No.:
Issues: Keeping Current Pilot
Program
Witness: Kory Boustead
Sponsoring Party: MO PSC Staff
Type of Exhibit: Surrebuttal Testimony
Case No.: ER-2014-0258
Date Testimony Prepared: February 6, 2015

MISSOURI PUBLIC SERVICE COMMISSION

REGULATORY REVIEW DIVISION

SURREBUTTAL TESTIMONY

OF

KORY BOUSTEAD

UNION ELECTRIC COMPANY d/b/a AMEREN MISSOURI

CASE NO. ER-2014-0258

*Jefferson City, Missouri
February 2015*

BEFORE THE PUBLIC SERVICE COMMISSION
OF THE STATE OF MISSOURI

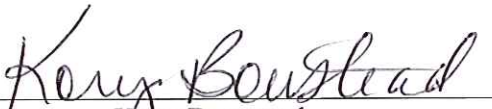
In the Matter of Union Electric Company)
d/b/a Ameren Missouri's Tariff to Increase)
Its Revenues for Electric Service)

Case No. ER-2014-0258

AFFIDAVIT OF KORY BOUSTEAD

STATE OF MISSOURI)
) ss
COUNTY OF COLE)


Kory Boustead, of lawful age, on her oath states: that she has participated in the preparation of the following Surrebuttal Testimony in question and answer form, consisting of 4 pages of Surrebuttal Testimony to be presented in the above case, that the answers in the following Surrebuttal Testimony were given by her; that she has knowledge of the matters set forth in such answers; and that such matters are true to the best of her knowledge and belief.



Kory Boustead

Subscribed and sworn to before me this 6th day of February, 2015.

SUSAN L. SUNDERMEYER
Notary Public - Notary Seal
State of Missouri
Commissioned for Callaway County
My Commission Expires: October 28, 2018
Commission Number: 14942086



Notary Public

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INTRODUCTION

Q. Please state your name, title and business address.

A. Kory Boustead, Rate & Tariff Examiner II, Missouri Public Service Commission (Staff), P.O. Box 360, Jefferson City, Missouri, 65102.

Q. Are you the same Kory Boustead who filed in Staff's Cost of Service report?

A. Yes I am

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EXECUTIVE SUMMARY

Q. What is the purpose of your surrebuttal testimony?

A. The purpose of this testimony is to respond to comments filed regarding Ameren Missouri's Low-income pilot program Keeping Current & Keeping Cool by the Office of the Public Counsel ("OPC").

Q. Does Staff agree with the tariff language change recommended?

A. Yes, Staff does not oppose the word change in the tariff language from "Customers will apply for weatherization and LIHEAP assistance" to "Customers **must** apply for weatherization and LIHEAP assistance" as it may help the agencies to inform and enroll the customers. However, based off of the evaluation completed in November 2012, lack of focus by the agency during the conversations with the clients while enrolling in the program may be attributed to the customer not applying for weatherization and LIHEAP. It is already

Surrebuttal Testimony of
Kory Boustead

1 an eligibility requirement for customers to have applied for each program before they are
2 enrolled in the Keeping Current Pilot Programs. A simple wording change still may not get
3 them applied, given it is already listed as an eligibility requirement.

4 Q. In the Survey's conducted for the program evaluation completed November
5 2012, what were the findings in regards to LIHEAP and Weatherization?

6 A. The November 2012 Keeping Current Program Final Evaluation Report by
7 Applied Public Policy Research Institute for Study and Evaluation ("APPRISE") found:

- 8 *1. LIHEAP and Weatherization – Interviews with agency staff provided some*
9 *evidence that referrals to these programs was not an important focus of the*
10 *conversation when enrolling clients, and the survey data support this finding.*

11 All customers who join Keeping Current are required to apply for LIHEAP
12 and Weatherization (if they have not already received weatherization
13 services). While the survey found that only 28 percent of year-round active
14 and 35 percent of summer cooling participants reported that they received
15 LIHEAP in the past year, the impact data showed that of those who had a full
16 year of post data, 70 percent of electric heat, 50 percent of alternative heat,
17 and 30 percent of cooling participants received LIHEAP. The majority of
18 those who reported that they did not receive LIHEAP reported that they did
19 not apply because they did not know about the program. If customers apply
20 for Keeping Current when the LIHEAP season is not open, they should be re-
21 contacted to apply for LIHEAP when the program does open.

22 The survey found that 31 percent of active year-round participants and 21
23 percent of summer cooling participants received weatherization as a result of
24 the Keeping Current program. It is likely that some customers already
25 received weatherization and some were on a waiting list, so this is a good
26 outcome for the program.¹

27 Q. Was there a recommendation by APPRISE for the agency caseworker and
28 manager to have additional training provided to them on the details of the Keeping Current
29 Program?

¹ Apprise (2012) Ameren Keeping Current Program Final Evaluation Report p. 82

1 A. Yes, in the evaluation under APPRISE's Findings and
2 Recommendations/Implementation section it is stated:

3 This section provides findings and recommendations with respect to Keeping
4 Current Program implementation. Recommendations are made with respect
5 to agency training, agency activity, customer education, referrals, follow-up,
6 LIHEAP, Ameren training, and budget billing.

7 2. *Agency Training – Provide additional training to agency caseworkers and*
8 *managers on the details of the Keeping Current Program.*

9 Although most managers and caseworkers reported that they were
10 comfortable with the amount of training provided by Ameren, and there
11 appeared to be an improvement in program understanding between the 2011
12 and 2012 interviews, the later interviews still indicated that caseworkers
13 needed more training in the following areas.

- 14 ○ Program benefits – There was confusion about how the arrearage
15 reduction and monthly bill credit work.
- 16 ○ Targeting specific groups – Caseworkers did not report that they focused
17 on the elderly and disabled clients.
- 18 ○ Requirements that individuals apply for LIHEAP and Weatherization
19 services – This did not appear to be a focus of agency staff.
- 20 ○ Providing clients with energy conservation education – This topic was not
21 covered during intake.²

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23 **STAFF RECOMMENDATION**

24 Q. What does Staff recommend?

25 A. Staff recommends in addition to the tariff language change there be more
26 training and follow up by Ameren Missouri with the agencies to make sure they are aware of
27 the importance of making sure the eligibility requirements are met of the program before
28 enrolling clients in the program. There also needs to be more thorough explanation to the
29 clients of how the program works and the benefits by the Keeping Current agencies and
30 making sure they spend more time helping the customer find and apply for other services and
31 benefits to assist them in being able to stay on the program.

² Apprise (2012) Ameren Keeping Current Final Program Evaluations Report p. 81.

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1 | Q. Does this conclude your surrebuttal testimony?

2 | A. Yes.